STATE OF NEW JERSEY
EDUCATIONAL OPPORTUNITY FUND

New!
Fiscal Year 2014

DOWNLOADING THE CONTRACT PDF FILE
CONTRACT INSTRUCTIONS
SIGNATURE PAGES
ATTACHMENT B1
ATTACHMENT B2
ATTACHMENT D2

FY2014 PRELIMINARY ALLOCATIONS/CONTRACT
For FY 2014, preliminary allocations for individual campus programs, as approved by the EOF Board of Directors, are available as a PDF file on the EOF website at:

http://www.nj.gov/highereducation/EOF/EOF_Forms.htm

Contracts will not be mailed to the institutions, but should be downloaded from the website.

The **contract signature pages**, **budget Attachments B1 and B2** and the EOF **Program Mission Statement and Goals Attachment D2** are due no later than Monday, July 8, 2013. The NJHE/EOF office cannot execute an official contract and process summer or academic year payments until all completed contract materials are received by our office.

What follows are the **4 STEPS** necessary to complete your institution's contract. **Contract signature pages will be returned via regular mail. Attachments B1, B2, and D2 must be returned to the EOF Central Office via email to Janis Flanagan at:** **janis.flanagan@njhe.state.nj.us**

STEP I. COMPLETING THE CONTRACT SIGNATURE PAGES

After preparing your summer and academic year budgets, and EOF Program Mission Statement and Goals which will be explained below, **the two contract signature pages should be signed where indicated by the institution's president only, and** *returned as original documents by regular mail to:*

Ms. Janis T. Flanagan, Assistant Director
NJ Educational Opportunity Fund

Office of the Secretary of Higher Education
20 West State Street – PO Box 542
Trenton, NJ 08625-0542

BUDGET INSTRUCTIONS

The following provides instructions for completing the summer (Attachment B1) and academic year (Attachment B2) budgets that will become part of your institution's contract. The information submitted on the contract budget forms is subject to audit and therefore should be prepared carefully and in compliance with the EOF regulations and any EOF Board of Directors' policies referenced herein.

The contract budget forms are organized as follows:

Attachment B1   **Article III Summer Support and Summer Cost of Education for Initial and Renewal Students.** For our accounting purposes, resources for summer funding may come from two fiscal years, however the budget forms should be completed and all expenditures reported without regard to this matter.

Attachment B2   **Article IV Academic Year Program Support.** EOF regulations 9A:11-6.9 (c) require institutions to provide at least a dollar for dollar match during the academic year program against the Article IV allocation.

These forms have been developed using Excel and are available on the Educational Opportunity Fund's website (**http://www.nj.gov/highereducation/EOF/EOF_Forms.htm**) **Requests by institutions for OSHE/EOF to mail or fax paper copies of the forms are discouraged.**

Institutions may make minor adjustments to these excel documents as needed or create their own budget pages using local available software as long as the format submitted is reasonably similar, properly labeled and provides the same information as requested. *However, using form B2 as provided by OSHE/EOF on the website has the advantage of being linked to the interim and final AY Article IV expenditure reports as attached worksheets. Figures entered on the contract budget form will automatically transfer to the columns titled "Budgeted" on the expenditure report forms.*

STEP II. ATTACHMENT B1
SUMMER BUDGET

This form is used to outline the budget for your summer program activities including all resources – EOF, institutional funds and other sources. Although matching funds are not required in the summer, institutions should document their monetary commitment to the program if applicable. Summer support funds should be reported separately from academic year support funds.

EOF funding for summer programs has two designations: Support services (personnel salaries and wages, materials, supplies and other administrative costs) and Cost of Education (tuition, fees, room, board, stipends, insurance).

Complete B1 as follows:

Provide the institution's name in the space provided on each page.

Explanation of Categories by row…

Article III "Summer Support"

I.	**Personnel:**	Enter by the following categories the total dollar amounts for all personnel directly related to the operation of the EOF summer program. Indicate the source of funding (EOF Article III, institution, other sources). Provide the percentage of time dedicated to the program by each position. Do not include 12-month staff listed in the Article IV Academic Year Support budget. Sub-total each category.
	Administrative:	Enter the total amount for salaries of all summer administrative staff who are not funded via the academic year program support budget.
	Counseling:	Enter the total amount for salaries of all summer counseling staff who are not funded via the academic year program support budget.
	Tutoring:	Enter the total amount for all full- and part-time tutoring staff, including the Tutorial Coordinator (if not funded with the academic year program support budget) and peer tutors.
	Instructional:	Enter the total amount for all summer instructional staff/faculty who will be paid directly for their services. **DO NOT INCLUDE INSTRUCTIONAL COSTS/SALARIES UNDER EITHER THE FUNDED VIA EOF ARTICLE III OR FUNDED BY INSTITUTION OR OTHER COLUMNS FOR COURSES THAT WILL BE COVERED BY TUITION THAT WILL BE CHARGED PER CREDIT THROUGH THE COST OF EDUCATION SECTION OF THIS BUDGET.**
	Clerical:	Enter the total amount for salaries of all summer clerical staff who are not funded via the academic year program support budget.

Other Salaries: Enter the salaries of other summer only staff who will not fit in any of the categories above. Be specific with names and/or position titles.

Total Personnel: Enter the sum for personnel listed in the categories above.

II. Fringe Benefits: EOF funds may not be used for fringe benefits at the senior public institutions. At public two year and independent institutions, fringe benefits are limited in the summer to cover the costs of Social Security and Unemployment benefits for **instructional staff only.**

I & II. Total Personnel And Fringe Enter the sum of Total Personnel and Fringe Benefits in each column.

Other Than Personnel Services:

III. Educational Materials And Supplies In each column, enter the total amount for educational materials and supplies for the summer program.

IV. Other Services In each column enter the total summer amount for other allowable items that do not fall into one of the categories listed above. For audit purposes, clearly specify each line item.

Total Summer Program Support Provide a grand total of Personnel (I.), Fringe (II.), Educational Materials and Supplies (III.) and Other Services (IV.).

Article III – "Summer Cost of Education"

V. Initial Students: For each category, enter the number of students, the number of credits PER STUDENT or the # of weeks, and the cost per credit or the cost per week. Multiplying these three entries for each row will give you the figure for the last column "Total Cost of Education" in that row. Then show how the total cost is distributed among EOF, institutional or other sources of funding.

Tuition If necessary, you may divide this category into additional lines when, for example, one group of students will take 6 credits and another will take 9. Show the number of students, the number of credits per student, and the cost per credit.

Fees		Student fees, including student activity fees, should be indicated here. If necessary, divide this category into additional lines when, for example, the amount of fees charged are based on the number of credits students are taking. Show the number of students, the number of credits and the fee cost per credit for each group
Room		Provide the number of residential students, the number of weeks in residence and the room cost per week PER STUDENT in the first three columns and distribute the funding across.
Board		Provide the same information as it relates to board costs for residential students. If you provide lunch costs for commuting students, show this on a separate line.
Stipends		Indicate the number of students who will receive a stipend by commuter and residential students, the number of weeks and the stipend amount per week.
Books		Indicate the number of students and the cost per student for books that will be used for summer program instruction/courses.
Insurance		Indicate the number of students and the cost per student for whom you will purchase summer insurance.
Subtotal Initials		Total the Funded by EOF, Funded by Institution, Funded by Other Sources and Total Cost of Education columns. Check to make sure that your figures agree across and down. Carry these figures over to the bottom of page 6 where indicated.
VI.	**Renewal Students:**	Follow the same instructions in each category for costs associated with renewal student attendance during the summer.
VII.	**Total Art. III**	**Tot. costs for initial and renewal student in each column.**

STEP III. ATTACHMENT B2
ARTICLE IV
PROGRAM SUPPORT BUDGET

This form is used to outline the budget for the academic year support program and the 12 month salaries and wages for permanent program positions. Include all resources – EOF, institutional funds and other sources. If you are using the form as provided by OSHE/EOF on the website, remember that the figures you enter will automatically transfer to the expenditure reports which

are included as worksheets on this file. Therefore, any corrections or amendments you make throughout the year will also transfer to the expenditure reports.

EOF regulation 9A:11-6.9 (c) requires at least a dollar for dollar match by the institution against the EOF allocation. The EOF director's salary and fringe many not be paid through EOF funds but may be used as institutional match. Including personnel on this budget who do not provide services for EOF students above and beyond those provided to the general student population is not acceptable as a way of calculating institutional contributions to meet the required match. Program reporting supervisors and other high level institutional officers who are required to serve all students should not be included as institutional match.

Complete B2 as follows:

Provide the institution's name in the space provided on each page.

Explanation of Categories by row…

I.	**Personnel**	Enter by the following categories the total dollar amounts for all personnel directly related to the operation of the academic year program. Include 12 month salaried staff. Indicate the source of funding (EOF, institution, and/or other sources). Provide the percentage of time dedicated to the program by each position and calculate the "Total Funding" for each position based on the percentage only. Subtotal each category.
	Administrative:	EOF funds may not be used to pay the salary or fringe benefits of the EOF Director. The program's reporting supervisor and other high-level campus officials are generally thought to serve the entire student body by virtue of their title and responsibilities and therefore should not be listed on this budget or used as part of the institutional match. List in this category the salaries of the Program Director, Associate Directors and Assistant Directors. Only institutions that have received approval by the Executive Director – EOF to have a less than 100% time director may correct that percentage time on this budget.
	Counseling:	Enter the salaries or wages of all academic year academic advisors, developmental specialists and professional or peer counseling staff.
	Tutoring:	Enter the salaries or wages of the tutorial coordinator and all academic year professional, para-professional or peer tutoring staff. For part-time personnel indicate the number of positions, the hourly wage and estimated hours of employment used to calculate the budget charge.

	Instructional:	Indicate the costs of all instructional staff who provide supplemental instruction, teach shadow courses, learning laboratories, etc. You may include the costs of test-prep classes or workshops here. Do not include salaries for individuals teaching courses for which students are charged tuition, including basic skills course sections reserved for EOF students or freshman orientation credit courses.
	Clerical:	Enter the salaries or wages of all clerical staff (secretaries and administrative assistants) who directly serve the EOF program during the academic year.
	Other Salaries:	Itemize here the costs of other campus staff who provide a direct service to the program (accounting, financial aid, etc.); workshop presenters; speakers; consultants; etc.
I.	**Total Personnel:**	Enter the sum for personnel listed in the categories above.
II.	**Fringe Benefits:**	Enter the total amount of fringe benefits for academic year staff listed in the categories above. EOF funds may not be used for fringe benefits at the senior public institutions. At public two year and independent institutions, fringe benefits paid from EOF funds may not exceed 21% of the salary for full-time staff. Benefits for full-time institutional staff who are less than 100% time EOF must be adjusted accordingly. EOF funds may not be used to pay employee benefits for student assistants and part-time personnel.
I & II.	**Total Personnel And Fringe**	Enter the sum of Total Personnel and Fringe Benefits in each column.
III.	**Educ. Materials**	In each column, enter the tot. amt. budgeted for the AY
IV.	**Consumables**	**Provide the same information for consumable materials**
V.	**Travel**	Provide the amount budgeted for staff professional development and student travel related to professional development and leadership training. Transportation of students for normal commuting costs is prohibited under Article IV.
VI.	**PAB**	Enter the costs associated with Program Advisory Board meetings and activities.
VII.	**Other Services**	Itemize the budgeted costs of other allowable items that do not fall into one of the categories listed above. For audit purposes, clearly specify each line item. Indirect/overhead costs may be used to

meet the required match but may not exceed 10% of the TOTAL program cost.

TOTAL BUDGET: Add up categories I. through VII. in each column. The EOF column may not exceed the Article IV allocation. Check that the institution has met the required match. Be certain that your figures agree across and down.

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STEP IV. ATTACHMENT D2
EOF PROGRAM MISSION STATEMENTAND GOALS

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GUIDE FOR DEVELOPMENT OF
EOF PROGRAM MISSION STATEMENT AND PROGRAM GOALS AND OBJECTIVES

The following document is intended to serve as a guide to the development of EOF Contract Attachment D2. You should develop the requested information in consultation with the appropriate institutional officials and your program staff. The information submitted on Attachment D2 will become part of your official contract with the Office of the Secretary of Higher Education/EOF. The information supplied on Attachment D2 may be used for future program reviews and as part of the reporting requirements of the EOF Annual report. In the Annual Report you will be asked to provide an update on your program outcomes and progress towards meeting the goals and objectives listed on Attachment D2.

Institutions may make minor adjustments to the Attachment D2 word document as long as the format submitted is reasonably similar, properly labeled and provides the same information as requested.

Attachment D2 must be completed **must be returned to the EOF Central Office via email to Janis Flanagan at: janis.flanagan@njhe.state.nj.us**
The NJHE/EOF office cannot execute an official contract and process summer or academic year payments until all completed contract materials are received by our office.

Attachment D2

Mission Statement	Goals/Objectives	Assessment Method &Criteria for Success	Summary of Data Collected	Use of Results
Will describe the overall purpose of the campus-based EOF program:	How does your program plan to meet the basic eligible EOF program requirements	Describe how you plan to measure all of the EOF program goals & objectives that	List & summarize the data you will collect to determine if you met each of the program's goals and objectives	How do you plan to use this information to enhance and/or make changes to current program practices

		you have identified		
Will describe how your program's mission supports the overall mission of your institution	Identify the EOF eligible population you plan to serve (recruitment & admission)	List the standards you will use to determine if you have met each of the programs goals & objectives		
Will describe how your program's mission relates to the funding source's mission (OSHE/EOF)	Identify student developmental skill needs and how you plan to address them			
Will describe how your local campus program aligns the broader statewide mission with the unique mission/direction of the host institution.	Identify summer program goals			
Will list the services to be provided	Identify how you will monitor student academic progress			
Will emphasize unique qualities of Your program	What types of student learning and development does the counseling & advisement component of the program offer			
	Specify how program services support student retention, (transfer to a 4-year institution, if applicable) and graduation			

Type of Goals and Outcomes

Administrative Unit/Program Level Outcomes (AUO) Example Summer Program
- Statements about either what students will experience, receive or understand as a result of a given service or what the unit can provide, improve, increase or decrease
    - Example – The mission/purpose of the summer program is to assess students' academic strengths, and areas requiring academic enrichment, and through a series of personal development workshops help students develop the behaviors/habits that will contribute to academic success during the freshman year.
    - Summer program will include
        - Developmental math or option for 1st level college math
        - Developmental English/writing or option for 1st level college composition
        - Science Survey Course or option for first level college science (depending on review of HS transcript)
        - Weekly Workshops (time management, study skills and behaviors, leadership development, becoming a master student,etc.)
        - Mandatory study sessions
    - Assessment will be a composite of data collected : grades earned in summer program courses, faculty assessment of students' readiness and academic work habits, results of placement exams, participation in xx% of workshops and study sessions, adherence to summer program attendance and participation requirements
    - Assessment data will be used to determine fall course placement including need for placement in developmental coursework, readiness to register for a minimum (12 credit) or a full-time schedule (15 credits), assignment to mandatory support schedule (bi-weekly or monthly contact).
        - 95 % of entering students' will successfully complete the summer program
        - Minimum of 10% of students will be eligible to pursue health-related and/or STEM majors.
        - X% of students will be exempt from developmental coursework during fall semester.

Student Learning Outcomes (SLO)
- Broad statements about what students will think, know, feel or be able to do as a result of an education experience
- Examples:
    - Activity/Workshop Level
    - Course level
    - Program level
    - Service level - students attending personal statement/essay workshops will list the methods used for constructing a competitive personal statement

Example – Student Success Workshop Series – As part of the summer program developmental activities, the SSWS targets the development of soft skills and meta-cognitive strategies that research suggests are highly correlated with students' successful transition to higher education. Supporting students' academic coursework, these sessions will cover time management, developing personal responsibility/self-regulation, program involvement, and ability to develop and engage a support network and inter-cultural competence and appreciation for others. Students' progress will be assessed using the locally developed SSWS Rubric.

Assessment – SSWS Rubric using both student self-assessment and feedback from faculty and staff. Supplemental information will also be derived from the SDI self-assessment of college readiness and faculty feedback on students' preparation, class participation and observations.

Use – Students scoring "Accomplished" and/or "Advanced" rating will be eligible for monthly contact with staff. Students scoring "Beginning" or "Developing" will be schedule for bi-weekly staff contacts.